

Determining Which Engagement Method to Use

HEAL Act Community Engagement Plan Resource

Stage of Community Engagement Spectrum: Inform

Purpose: To provide information or address immediate needs/issues.

When to use: There is no alternative due to urgency, regulatory reasons, or legal boundaries.

Methods

- Town Halls
- Community meetings
- Media
- Social media
- Materials
- Web

Resources and Tools

Technology options for virtual meetings:

- Facebook Live for town halls and community meetings.
- YouTube Live for town halls and community meetings.
- WhatsApp to encourage chat dialogue Video conference (for remote participation, feedback and testimony).
- Online town hall using Twitter Town Hall (to increase geographic reach).

For in-person town halls and community meetings:

- Identify primary audience and vision for the meeting or event.
- You will get the highest turnout if you host the meeting in a place where the community naturally and regularly meets on their own or combine it with an existing meeting.
- Set a clear agenda with a designated moderator and speakers.
- If appropriate, engage local media to help publicize the event. Identify communications channels that will best reach the primary audience.

For external communications (media/social media/materials/web):

- Begin by developing a communications guide.
- Identify communications channels that will best reach the primary audience.
- Ensure messages are tailored to your audience.

Stage of Community Engagement Spectrum: Consult

Purpose: Get and incorporate feedback.

When to use: You'd like to improve an existing service/program, but options (of change) are limited.

Methods

- Focus groups
- Interviews
- Surveys
- Stakeholder group

Resources and Tools

Technology options:

- Online focus group using Facebook Groups or GoToMeeting for focus groups.
- Interviews via phone or in-person.
- Paper-based and mail surveys may be effective for surveys.
- Online or electronic surveys to broaden reach (Survey Monkey, Opinio or online polls are examples).
- Video conference to allow remote attendance at stakeholder groups.

For focus groups:

- Identify a trained facilitator and note-taker.
- Carefully plan how you will organize and recruit for the focus groups. Bring individuals together with a common characteristic, and structure the conversation to ensure all participants can express their honest opinions.
- Provide incentives to thank participants for their time.
- Prepare your questions so you can benefit from group dialogue. Questions should be open and elicit group discussion.
- Recording the focus group may be beneficial for notetaking and facilitation purposes but should be carefully considered because it may inhibit participation from some people.

For interviews:

- Interviews let you explore a particular subject more in depth and allow you to learn something you might not get from a survey. They can also be used to build and strengthen partnerships.
- Use as a starting point to help you plan other community engagement efforts. The insight and perspective you can gain from community leaders can help you plan more effective and culturally appropriate community meetings, focus groups, and community mobilization efforts.

Stage of Community Engagement Spectrum: Involve

Purpose: To ensure needs and interests are considered.

When to use: Community perspective and buy-in is necessary to be successful in project implementation.

Methods

- Audience and user testing
- Advisory groups
- Steering committees
- Community conversations

Resources and Tools

Technology options:

- Audience and user testing can be done in-person, via phone or email, or through online platforms.
- Video conference to increase participation in council, advisory or committee meetings.
- GoToWebinar and other online platforms can facilitate virtual community conversations.
- For audience and user testing:
 - Audience and user testing are ideal for helping you understand how your primary audience may respond to your messages, materials, or information. The goal is to understand their knowledge, beliefs, attitudes, barriers, and cues to act.
 - Clearly define your primary audience and think about what you want them to know or do.
 - Health promotion, behavior change, and communication theories can help you plan your testing.
 - For user testing, choose a technique that fits your session goals and plan ahead for any equipment needs. It may be easiest to hold the usability testing in a location with laptops.
 - For both audience and user testing, make sure to pilot your questions and test ahead of time.

For advisory groups and steering committees:

- Advisory boards and steering committees are ideal for keeping your project connected to the big picture. Many groups meet on a quarterly basis to provide strategic direction, but some meet more frequently for more hands-on work. There may already be an existing group or committee that you can engage with.
- The effectiveness of these groups depends on the structure that is put in place at the beginning including choosing the right members, thoughtfully planning and facilitating meetings, and setting clear expectations.
- Advisory boards or councils can be created to bring voices to the table who are often not well represented in decision-making, for example: youth.
- Plan a formal onboarding for your committee, council, or board members to ensure they have a similar foundation related to your project and equity overall.

For community conversations:

- Build a team to determine the goals for the conversation and host the event. Your team should include members of the community to ensure their own goals, interests, and issues are well represented.
- Choose a facilitator that is experienced and can create a trusting environment with the participants. Sometimes it is best to choose someone from within the community and sometimes it is more appropriate to choose someone who is neutral and outside of the community.
- Create an inviting environment and structure the room for dialogue. Tables in a 'U' shape or in circles are ideal for small group conversations.

Stage of Community Engagement Spectrum: Collaborate

Purpose: To partner and share decision-making.

When to use: Community members have a strong desire to participate and you have done the pre-work to build trust.

Methods

- Collective impact
- Coalition building
- Partnership building

Resources and Tools

Technology options:

- Bring people together in a shared space for successful collective impact initiatives and coalition building.
- Video conference to allow remote participation in collective impact initiatives and coalition building.
- Ongoing collaboration with existing partners can assist with successful partnership building.

For collective impact initiatives:

- A 'Collective Impact' model brings organizations together to work toward a common goal through a structured framework.
- The five core conditions of the Collective Impact framework are: 1) Develop a common agenda. 2) Use shared measurement. 3) Build on mutually-reinforcing activities. 4) Engage in continuous communications. 5) Provide a backbone to move the work forward.

For coalition building:

- Coalitions can be used to influence public policy, promote behavior change in communities, and build a healthy community.

- Some of the drivers for building coalitions include:
 - To respond to negative events in the community (e.g. increased suicides).
 - New information becomes available (e.g. new research about a specific disease).
 - Circumstances or rules change (e.g. a new law).
 - New funding is available (e.g. a federal grant that requires a coalition).
 - There's a threat to the community (e.g. an important service might get cut).
 - Coalitions include a core group of stakeholders, community opinion leaders, and policy makers.

For partnership building:

- Partnerships can be formal collaborations just between two organizations, or can result in the formation of a committee, coalition, council, or other group of partners with representatives from various organizations, and therefore be more strategic in nature.
- Partnerships can also be informal agreements or collaborations that are short term and project specific.

Determine which partners and what type of partnership is appropriate for your specific project or problem you are trying to address.

Stage of Community Engagement Spectrum: Defer

Purpose: To support and follow a community's lead.

When to use: Community members want to own a project and you're committed in the long-term.

Methods

- Community immersion
- Community mobilization

Resources and Tools

Technology options:

- Use relevant social media platform for communities that may prefer that method.

For community immersion:

- Support initiatives and projects that are important to the community, even if it is not an agency priority.
- Attend community events and gatherings with the intent of listening and learning.

For community mobilization:

- Ensure you have strong leaders and provide them the support they need.

- Establish a formal structure, which may include a steering committee and subcommittees. Ensure the six essential functions of community mobilization efforts are covered: 1) Providing overall strategic direction. 2) Facilitating dialogue between partners. 3) Managing data collection and analysis. 4) Planning communications. 5) Coordinating outreach. 6) Fundraising.
- Develop guiding documents such as organizational charts, rules of operation or bylaws, policy statements, and formal letters of agreement.
- Engage community partners who share priorities and interests. Consider partners who work in other agencies, in health or social service organizations, business owners, policy makers, media representatives, faith leaders, and others who have significant influence in their community.

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